

Exhibit A – Exchange Procurement of Support for Additional Studies

1. Call Center and Consumer Assistance Inventory and Road Map

A. Elements in Scope of Assistance

- The Exchange is seeking a contractor to support the Exchange to develop an inventory of current Maryland call centers and their capabilities, an analysis of consumer assistance data received through these call centers, and the development of a road map for how an Exchange call center can best coordinate with existing resources.
- The Exchange may exercise options for assistance with an assessment of existing call center technology and the feasibility and scalability of integrating with the Exchange call center; or other related work.

B. Proposed Potential Deliverables:

- **Final Work Plan:** The Offeror selected shall propose a work plan that sets forth the methodology to be used and a timeline for completing the deliverables, including opportunities for appropriate input from the Exchange staff, Board and stakeholders
- **Analysis of Consumer Assistance Data:** The Offeror selected shall gather and analyze consumer assistance complaint data from existing Maryland resources to inform Exchange policy decisions related to certification of Qualified Health Plans and consumer assistance needs that could be met through the Navigator program.
- **Inventory Maryland Consumer Assistance Resources and Call Centers:** The Offeror selected shall develop a detailed inventory of existing consumer assistance resources. This should include, identification of resources, purpose of resource, population served, volume of contacts, referral patterns, technology systems, data analysis capability and current issues and challenges in operations.
- **Summary of Best Practices:** The Offeror selected should identify best practices on coordination of consumer assistance resources. This could include other state efforts, local efforts or private sector strategies.
- **Development of Options (Road Map):** The Offeror selected shall develop options for coordination of consumer assistance resources with the Exchange call center.

The work plan should address a process for gaining input from different state Agencies as well as other stakeholders.

C. Criteria and process to evaluate proposals

- The Exchange will conduct a competitive solicitation of sealed proposals.
- The Board delegates the Chair to designate an Evaluation Committee which may include Board representation.
- The Evaluation Committee will recommend the proposals that achieve the maximum benefit for the Exchange and the State, considering:
 - o The experience and qualifications of the proposed contractor;
 - o The experience and qualifications of the proposed staff;
 - o The reasonableness and likely success of the proposed workplan; and
 - o The proposed budget.

D. Anticipated period of contractor performance

- November 29, 2011 – June 30, 2012.

2. Exchange Enrollment Take-Up Model

A. Elements in Scope of Assistance

- This RFP seeks to build the analytic capacity of the Exchange to understand key policy and operational assumptions that drive enrollment trends, the potential enrollment in the Exchange and the shifts in coverage from other markets; and the characteristics of individuals who are likely to enroll in the Exchange. This study will use available data to develop an enrollment model that can provide a baseline estimate and can be modified to support the future decision-making of the Exchange Board and Maryland policymakers. The contractor will be expected to work with the Exchange to develop a robust analytic methodology, which can be handed off to the Exchange to support future projections; and will also be expected to make recommendations on future enhancements to the model when more is known about federal and state policy decisions. Key issues the study and model must address include:
 1. Develop enrollment estimates based on assumptions that drive low, medium and high Exchange enrollment.
 2. Provide annual estimated coverage trends from pre-reform baseline through 2020. The model should estimate enrollment for Medicare, Medicaid, Exchange w/Subsidy, Exchange w/out subsidy, ESI in Exchange, ESI outside Exchange, and Individual market outside Exchange.

3. Identify key policy and operational assumptions that drive enrollment trends.
4. Identify shifts in coverage and differential affects by socio-economic and demographic factors
5. Identify characteristics of individuals who are likely to enroll in the Exchange.
6. Identify characteristics of individuals likely to enroll at different actuarial levels.

B. Proposed Potential Deliverables:

- Final Work Plan: The Offeror selected shall propose a work plan that sets forth the methodology to be used and a timeline for completing the deliverables, including opportunities for appropriate input from the Exchange staff, Board and stakeholders.
- Methodology: The Offeror selected shall develop a detailed description of their proposed methodology, including data sources. The methodology should describe all macro-economic assumptions such as the changes the economy, age of population and overall health care trends that are included in the model.
- Report on Enrollment Estimates: The Offeror selected shall develop a report summarizing their enrollment projections and analysis of issues. This report should describe the methodology, assumptions and limitations of the analysis sufficiently so that it is understandable to a broad audience of different stakeholders.
- Enrollment Take-Up Model: The Offeror selected shall develop and provide to the Exchange the analytic tools used to develop enrollment estimates and analysis of issues. This includes all background data sheets, assumptions sheet, front end input of policy and operational decisions, and any other information necessary for the Exchange staff to independently use this model to make future enrollment projections.
- User guide and Training: The Offeror selected shall develop a user guide and training plan so that Exchange staff can be trained to use the model to make future estimates.
- Report on Recommendations for Future Model: The Offeror selected shall develop recommendations on future enhancements to the enrollment model to improve the Exchange's ability to make accurate enrollment projections.

C. Criteria and process to evaluate proposals

- The Exchange will conduct a competitive solicitation of sealed proposals.

- The Board delegates the Chair to designate an Evaluation Committee which may include Board representation.
- The Evaluation Committee will recommend the proposals that achieve the maximum benefit for the Exchange and the State, considering:
 - The experience and qualifications of the proposed contractor;
 - The experience and qualifications of the proposed staff;
 - The reasonableness and likely success of the proposed workplan; and
 - The proposed budget.

D. Anticipated period of contractor performance

- November 29, 2011 – August 15, 2012.